

Book highlight—Aligning for results

Riaz Khadem | Linda Khadem

Brian was holding his monthly results meeting. He had asked the Infoman to sit in, observe, and give him feedback on his meeting and how it could be improved. He was concerned about the amount of time the meetings were taking, and was not sure if the time was well spent.

Brian began his meeting by sharing news about changes in regulations that were affecting the XCorp businesses. He talked about potential opportunities and threats, discussed the priorities for the month, and then invited each of his directors to report on the progress made in their area during the previous period. Each person gave a detailed presentation with a number of slides, charts, graphs, and figures along with comparisons against targets and with the prior year. Some of the slides were quickly passed over; others were explained in great detail. The presentations by all Brian's direct reports took a significant amount of time.

After the meeting was over, Brian and the Infoman, met to debrief. The Infoman explained that the presentation of the performance of different areas was not the best use of the valuable time of this group of high-level executives. Those present did not need to hear the amount of detail that was reported. Many seemed "tuned out" when others were presenting. The meeting didn't result in a coherent action plan. There was little real consultation. The presentations were for the most part focused on the past.

The Infoman offered a new approach to increase the effectiveness of the meeting. Rather than focusing on the presentation of each member of the team and looking mostly at data on what had already taken place, why not change the focus? Why not make the meeting upward focused and future oriented? The focus could be on Brian's scorecard and how to improve it, rather than on the scorecards of each direct report. Reference to the past would be primarily to obtain accurate data for analysis in order to make a plan for a better future.

This would mean that instead of reviewing the eight scorecards of the team members, they would be reviewing only one scorecard, Brian's. The energy of the group would be directed toward improving the scorecard of the team leader. The dynamic of the team would change from passive

observers to active participants whose creative input and experience would benefit the action plans that emerged.

If Brian adopted this approach, he would gain a lot, but would be missing two types of information that could be provided more effectively in different spaces. First, he would miss reviewing the performance of each team member. A more appropriate space for this type of information would be a one-on-one meeting with each direct report. Second, his team could miss hearing important information from other areas. A short time in the agenda of the team meeting would be designated for briefly sharing relevant information that is important for the other team members to be aware of.

ALIGN IT: REVIEWING TEAM RESULTS, ASSESSING OUTCOMES, AND CREATING ACTION PLANS

Meetings to review results take place in companies of all sizes. They are necessary for watching the financial and operational performance of the company and to "read the reality." But unfortunately, the majority of the time is spent on reporting on the past and in great detail. We are recommending that the focus of these meetings be changed from the past to the future and from reviewing the scorecards of the team members to reviewing the scorecard of the team leader. Effectively, the team reviews the focus and feedback reports of the team leader in order to develop action plans for improving the team leader's scorecard. Also, on a regular basis, the team reviews the management report of the team leader in order to ascertain the quality of the data and goals, and to recognize good performers. The review and conversation leading to action takes place at the right level.

Upward focused teams

The concept of teams reviewing the Focus Report of their boss and collaborating to improve his or her performance will be a huge change for many organizations. The usual practice